Partnering Workshop Facilitator Checklist

Project Name: **TRACS #:**

Facilitator: **Workshop Date:**

Planning for the workshop

- [ ] Collect background information for the project, construction org and contractor (history, number of jobs together, PEP evaluations).
- [ ] Use the Workshop Kickoff Team Checklist to determine details of the workshop.
- [ ] Include other stakeholders as dictated by the project.
- [ ] If possible, drive through the project with the RE and contractor to understand the scope.
- [ ] Confirm logistics of the workshop such as the date, duration, time, stakeholder list and location.
- [ ] Determine if a partnering tip would be applicable for the workshop.project and their partnering experience.
- [ ] Create agenda and sign-in sheets for workshop or class.

Facilitating the workshop

- [ ] *Provide name tags or name tents and markers.
- [ ] *Provide a handout for each participant that includes an agenda and a Participant Workshop Evaluation form.
- [ ] *Provide a sign in sheet that includes contact information (name, company, phone, email).
- [ ] *Provide the Class Sign-in Sheet for "Introduction to Partnering Part II" for ADOT employees.
- [ ] *Provide flip charts, markers, projector, computer and other equipment as required.
- [ ] Introduce yourself and describe your role. Ask participants to introduce themselves and discuss their role in the project and their partnering experience.
- [ ] Have an ADOT representative give a brief overview of the project.
- [ ] Have a contractor's representative give an overview of the schedule.
- [ ] Present the history of partnering if appropriate for the project team.
- [ ] Explain the purpose and benefits of partnering.
- [ ] Assist the project team in creating a Partnering Charter that includes a mission statement and project/team goals. Assist in creating team guidelines if applicable.
- [ ] Discuss the issue resolution process and importance.
- [ ] Create an Issue Escalation Ladder using the draft as a starting point.
- [ ] Explain the role and responsibilities of the Partnering Champions.
- [ ] Identify the Partnering Champions.
- [ ] Explain the Partnering Evaluation Program (PEP).
- [ ] Identify sub-goals for the five standard PEP goals. Add additional goals if the team desires.
- [ ] Identify and instruct the team on specific ways to use PEP and the reports available.
- [ ] Develop agreements for the timing of regular evaluations.
- [ ] Facilitate a discussion of issues, record the discussion and create an Action Plan.
- [ ] Review specific assignments generated during the workshop and check for team member's commitment.
- [ ] Ask for closing comments from team members and from project leaders.
- [ ] Collect completed Participant Workshop Evaluation forms.

*Task will be completed by facilitator support staff when possible.

ADOT

Partnering

Partnering Workshop Facilitator Checklist

Post Workshop requirements

☐	**Complete a customized Partnering Workshop Report, Evaluation Summary and Attendance List.
☐	Inform the RE and the contractor project manager that a "Facilitator Performance Evaluation" form is available.
☐	Send the Workshop Report (PDF), PEP form with the subgoals (fillable PDF) and Action Plan (Word) to the project team within seven calendar days.
☐	Return the ADOT Class Sign-In Sheet to Partneringinfo@azdot.gov.
☐	*Enter the PEP subgoals into the PEP system.
☐	*Send an email to the Partnering PEP Administrator requesting champion rights for the project champions.
☐	*Scan the workshop evaluations and save them in the project folder.
☐	*Scan the sign-in sheets and save them in the project folder.
☐	*Copy all email addresses to the Master List.
☐	*Add the pertinent information to the Partnering Services Database (evaluation data, partnering tip data, report in the G drive check box, Champion pilot checkbox, completed date, fees and facility data, pertinent comments).
☐	Follow the QC protocol for what information is maintained in the construction folder on the share drive. Delete items that are not required to be housed in the construction folder or save them to a personal folder.
☐	Check PEP periodically throughout the project.
☐	Consultants and APFN members are to provide follow up, additional consultation or facilitation during the project if requested by the Partnering Office.

*Task will be completed by facilitator support staff when possible.

**Facilitator drafts Workshop Report and sends to facilitator support staff. Facilitator support staff adds the Evaluation Summary and Attendee List to the Workshop Report and returns to facilitator. Facilitator reviews information using "Track Changes" to highlight any errors in the information and returns Workshop Report to facilitator support staff. Facilitator finalizes the Workshop Report and sends to Project Manager for review and approval. Facilitator sends approved final Workshop Report to project team and facilitator support staff. Facilitator support staff enters PEP and database information.